GHL Automation Blueprint v2 — Soleil Pharmacy

Enhanced from Gemini v1. Fixes: missing pipeline stages, broken refill logic, payment/consent spec gaps, SLA escalation, complete custom fields & tags, per-workflow AI prompts.

1. Prescription Journey Map (Corrected 8-Stage)

#	Stage	Owner
1	Provider Acquisition & Onboarding	SDR / GHL
2	Prescription Intake	GHL / Portal
3	**Pharmacist Review & Data Entry** *(was merged into Stage 2 — incorrect)*	Pharmacist / Pioneer
4	Patient Payment & Consent	GHL
5	Fulfillment / Compounding	Pioneer
6	Dispensing (Shipping or Pickup)	GHL / Staff
7	Follow-up & Refills	GHL
8	Legacy Fax Exception Handling *(new)*	SDR / GHL

2. Pipelines (Corrected & Complete)

Pipeline 1: B2B Provider Sales Pipeline

```
Lead → Contacted → Demo Scheduled → Credentialing → Contract
Signed → Portal Activated
```

v1 gap fixed: *Added* `Contract Signed` *stage (Soleil now uses contractor agreements).*

Pipeline 2: Patient Rx Fulfillment Pipeline

```
Rx Received → Pharmacist Review → Pending Payment → Compounding
→ Ready for Pickup / Shipped → Complete
```

> **v1 gap fixed:** *Added* `Pharmacist Review` *stage. v1 skipped Stage 3 (verification) entirely — payments were triggering before pharmacist sign-off.*

3. Complete Custom Fields

Provider Contact Fields

Field	Type	Notes
NPI Number	Text	Required for credentialing
Clinic Name	Text	
Preferred Communication	Dropdown: Email / SMS / Portal	
Portal Activation Date	Date	For onboarding SLA tracking
Contract Signed Date	Date	Required before Portal Activated stage

Patient Contact Fields

Field	Type	Notes
Pioneer Rx #	Text	Links GHL record to Pioneer
Formula ID	Text	Specific compound formula
Prescriber Name	Text	
Prescriber NPI	Text	**NEW — needed for refill routing**
Days Supply	Number	**NEW — critical for refill trigger math**
Rx Expiration Date	Date	**NEW — stop refill prompts when expired**
Refill Count Remaining	Number	**NEW — prevent prompting when 0 refills left**
Compound Type	Dropdown: Sterile / Non-Sterile	**NEW — affects compounding SLA**
Consent Signed Date	Date	**NEW — HIPAA audit trail**
Payment Date	Date	**NEW — revenue analytics**

Tracking Number	Text	
Shipment Carrier	Dropdown: UPS / FedEx / USPS / Other	**NEW**
Preferred Language	Dropdown: English / Korean / Vietnamese / Other	**NEW — Soleil's patient demographics**
Auto-Refill Enrolled	Checkbox	**NEW**

4. Complete Tags

Provider Tags

- `B2B-Lead`
- `Portal-Activated`
- `Contract-Signed`
- `Legacy-Fax-User` — provider still faxing; needs portal training
- `High-Volume-Clinic` — priority account
- `Portal-Training-Pending`

Patient Tags

- `Rx-Received`
- `Pharmacist-Review-Pending`
- `Payment-Pending`
- `Consent-Signed` — **NEW**
- `Payment-Complete`
- `Compounding`
- `Shipped`
- `Refill-Due`
- `Refill-Auth-Active` — **NEW** provider authorized refills remain
- `New-Rx-Required` — **NEW** refills exhausted, need new script
- `Auto-Refill-Enrolled` — **NEW**
- `Korean-Language` — **NEW** for language-specific templates
- `Rx-Expired` — **NEW** stop all refill prompts

5. Automation Workflows (Node-by-Node Logic)

Workflow 1: B2B Lead Nurture & Onboarding

Trigger: Form submission OR tag `B2B—Lead` added manually

```
1. WAIT: 0 min
2. ACTION: Send Email — "Welcome to Soleil Prescriber Portal"
(template)
3. ACTION: Send SMS — "Hi [name], we received your inquiry.
Check email for next steps."
4. ACTION: Create Opportunity in "B2B Provider Sales Pipeline" →
Stage: Lead
5. ACTION: Create Task → Assign to SDR: "Follow up within 24hrs
— verify NPI [NPI Number]"
6. WAIT: 2 days
7. IF/ELSE: Tag contains "Portal—Activated"?
   → YES: END workflow
   → NO: Continue
8. ACTION: Send Email — "Demo invite: Book your 15—min portal
walkthrough"
9. WAIT: 3 days
10. IF/ELSE: Tag contains "Portal—Activated"?
    → YES: END
    → NO: Create Task → SDR: "Manual follow—up required —
[Clinic Name]"
```

Exit condition: Tag `Portal—Activated` added.

Workflow 2: Rx Intake & Pharmacist Notification

Trigger: Webhook from Prescriber Portal / eRx system (payload: patient name, DOB, Formula ID, Prescriber NPI, Days Supply)

```
1. ACTION: Add/Update Contact — map webhook fields to custom
fields
   — Set: Pioneer Rx #, Formula ID, Prescriber NPI, Prescriber
Name, Days Supply
2. ACTION: Create Opportunity in "Patient Rx Fulfillment
```

```
Pipeline" → Stage: Rx Received
3. ACTION: Add Tag: Rx-Received
4. ACTION: Send Internal Notification → Pharmacist (email +
SMS):
   "New Rx received for [patient first name only — no PHI].
Pioneer Rx #: [Pioneer Rx #]. Formula: [Formula ID]. Review
required."
5. ACTION: Move Pipeline Stage → "Pharmacist Review"
6. ACTION: Add Tag: Pharmacist-Review-Pending
7. WAIT: 2 hours
8. IF/ELSE: Pipeline stage still "Pharmacist Review"?
   → YES: Send escalation alert → Thuy + Pharmacist: "Rx pending
review >2hrs — [Pioneer Rx #]"
   → NO: END (pharmacist moved it forward)
```

Exit condition: Pharmacist moves stage to "Pending Payment" in GHL (or Pioneer webhook fires status: Verified).

Workflow 3: Patient Payment & Consent Chase

Trigger: Pipeline stage changes to "Pending Payment"

```
1. ACTION: Add Tag: Payment-Pending
2. ACTION: Send SMS to Patient — "Your order from Soleil
Pharmacy is ready for review. Please complete your secure form:
[payment+consent link]. Reply STOP to opt out."
3. ACTION: Send Email to Patient — "Action Required: Complete
Your Soleil Pharmacy Order" (generic body, link to
payment+consent portal)
4. WAIT: 24 hours
5. IF/ELSE: Tag "Payment-Complete" present?
   → YES: END workflow
   → NO: Continue
6. ACTION: Send SMS Reminder — "Reminder: Your Soleil Pharmacy
order is awaiting payment. Link: [link]"
7. WAIT: 24 hours
8. IF/ELSE: Tag "Payment-Complete" present?
   → YES: END
   → NO: Continue
```

```
9. ACTION: Send Email Reminder #2
10. WAIT: 24 hours
11. IF/ELSE: Tag "Payment-Complete" present?
    → YES: END
    → NO: Continue
12. ACTION: Create Task → Staff: "Manual call required — patient
has not completed payment after 3 reminders. Contact: [patient
first name], Pioneer Rx #: [Pioneer Rx #]"
13. ACTION: Move Pipeline → Back-flag (add internal note — do
NOT expose PHI in task title)
```

Payment detection: GHL native payment OR webhook from Stripe on `payment_intent.succeeded` → adds tag `Payment-Complete` + `Consent-Signed`, moves pipeline to "Compounding".

> *Consent tool: Use GHL native form embedded in the payment page (HIPAA mode enabled). Capture `Consent Signed Date` on submission.*

Workflow 4: Compounding → Dispensing Status Updates

Trigger: Pipeline stage changes to "Compounding"

```
1. ACTION: Add Tag: Compounding
2. ACTION: Send SMS to Patient — "Good news — Soleil Pharmacy is
preparing your order. We'll notify you when it's ready."
3. WAIT: Watch for Pioneer webhook OR manual pipeline update
```

Trigger (dispensing): Pipeline stage → "Shipped" OR "Ready for Pickup"

```
FOR "Shipped":
1. ACTION: Add Tag: Shipped
2. ACTION: Send SMS — "Your Soleil Pharmacy order is on the way!
Carrier: [Shipment Carrier] | Track: [Tracking Number]"
3. ACTION: Send Email — same, with clickable tracking link
4. ACTION: Set field "Shipped Date" = today (for refill trigger
calculation)

FOR "Ready for Pickup":
1. ACTION: Send SMS — "Your Soleil Pharmacy order is ready for
```

pickup. Our address: [address]. Hours: [hours]."
2. ACTION: Send Email — same

Workflow 5: Refill Reminder Sequence (Dynamic — Fixed from v1)

Trigger: Tag `Shipped` added AND field `Days Supply` is set

> **v1 was broken:** *Hardcoded +21 days. This version uses* `Days Supply` *to calculate the window.*

```
CALCULATE: Refill Wait = (Days Supply - 9) days
→ 30-day supply → trigger at Day 21
→ 60-day supply → trigger at Day 51
→ 90-day supply → trigger at Day 81

1. WAIT: [Refill Wait] days after "Shipped Date"
2. IF/ELSE: Tag "Rx-Expired" present?
   → YES: END — do not prompt
   → NO: Continue
3. IF/ELSE: Field "Refill Count Remaining" = 0?
   → YES: Add Tag: New-Rx-Required → Send SMS: "It's time to
check in on your Soleil order. Please contact your provider for
a new prescription." → Create Task for SDR to alert the
prescriber.
   → NO: Continue
4. ACTION: Send SMS — "Hi, your Soleil Pharmacy order may be
running low. Reply YES to start your refill, or call us if you
have questions."
5. WAIT: 48 hours
6. IF/ELSE: Patient replied YES (or tag "Refill-Requested"
added)?
   → YES: Move Pipeline → Pending Payment (triggers Workflow 3)
+ notify provider
   → NO: Send one follow-up SMS → create task for staff if no
reply in 24 more hours
```

Workflow 6: Legacy Fax Exception Handling (NEW)

Trigger: Tag `Legacy-Fax-User` added OR manual intake from fax

```
1. ACTION: Create Task → SDR: "Legacy fax received from [Clinic
Name]. Manual data entry required. After entry, schedule portal
training call."
2. ACTION: Add Tag: Portal-Training-Pending
3. ACTION: Send Email to Provider — "We received your
prescription. To speed up future orders, here's how to submit
via our portal: [portal guide link]"
4. ACTION: Move Provider in B2B Pipeline → "Portal Training
Pending" (custom stage)
5. WAIT: 3 days
6. IF/ELSE: Tag "Portal-Activated" present?
   → YES: Remove tag Legacy-Fax-User → END
   → NO: Create escalation task → Thuy: "[Clinic Name] still on
fax — training call needed."
```

Workflow 7: Provider Portal Onboarding (Post Contract Signed)

Trigger: B2B Pipeline stage → "Contract Signed"

```
1. ACTION: Send Email — "Welcome to Soleil Pharmacy — Your
Portal Access" with credentials + PDF guide
2. ACTION: Send SMS — "Your Soleil prescriber portal is ready.
Check email for login. Questions? Reply here."
3. WAIT: 2 days
4. IF/ELSE: Tag "Portal-Activated" present?
   → YES: Send congratulations + resource email → Move Pipeline
→ Portal Activated → END
   → NO: Send follow-up + schedule 1-on-1 onboarding call
(Calendly link)
5. WAIT: 3 days
6. IF/ELSE: Tag "Portal-Activated"?
   → YES: END
   → NO: Create Task → SDR: "Manual portal onboarding needed —
[Clinic Name]"
```

6. Forms / Surveys

Form	Fields	Notes
Provider Inquiry Form	Name, NPI, Clinic, Email, Phone, Preferred Communication	Triggers Workflow 1
Patient Payment + Consent Form	Payment method, HIPAA consent checkbox, Digital signature, DOB confirmation	HIPAA mode; no medication names
Patient Intake (if no portal)	DOB, Address, Insurance, Allergies	Used for cash-pay patients only

7. Email / SMS Templates (Complete List)

Template	Channel	Stage
Welcome to Soleil Prescriber Portal	Email	Stage 1
Demo/Booking Invite	Email	Stage 1 follow-up
Portal Training Guide	Email	Legacy Fax transition
Contract Signed — Portal Access	Email	B2B Contract Signed
Rx Received — Internal Alert	Email + SMS (to pharmacist)	Stage 2
Action Required: Complete Your Order	Email	Stage 4 — Payment
Payment Reminder (x2)	SMS + Email	Stage 4 — Chase
Your Order is Being Prepared	SMS	Stage 5 — Compounding
Your Order Has Shipped	SMS + Email	Stage 6
Your Order is Ready for Pickup	SMS + Email	Stage 6
Refill Reminder	SMS	Stage 7
New Prescription Required	SMS	Stage 7 — 0 refills
Provider Adherence Report	Email (to provider)	Stage 7

PHI rule: *No medication names, diagnoses, or clinical details in any template. Use "your order" / "your item" only.*

8. Internal Notification Routing

Event	Notify
New Rx received	Pharmacist on duty (SMS + Email)
Rx pending review >2hrs	Pharmacist + Thuy
Payment not received after 3 days	Front desk / SDR
Compounding stalled >expected SLA	Thuy
Patient reports adverse effect (refill reply)	Pharmacist (create task immediately)
Legacy fax received	SDR
New B2B lead	SDR
Provider not activated after 7 days	Thuy

9. Compliance Checklist (Before Going Live)

- ☐ GHL account set to HIPAA Compliance Mode ($297/mo+ plan)
- ☐ Business Associate Agreement (BAA) signed with GHL
- ☐ Payment processor BAA signed (if using Stripe — sign separately)
- ☐ All SMS templates reviewed — zero PHI/medication names
- ☐ Patient consent form includes HIPAA notice
- ☐ GHL conversations set to purge after [retention period per state law]
- ☐ Pioneer Rx remains source of truth — GHL never stores clinical data
- ☐ Webhook endpoints for Pioneer → GHL secured (HTTPS + secret token)
- ☐ Two-factor authentication enabled on GHL account

10. Recommended Build Order (Refined)

Phase 1 — Revenue & Cash Flow (Build First)

1. Enable HIPAA mode + sign BAA
2. Create Patient Rx Fulfillment Pipeline (with `Pharmacist Review` stage)
3. Build Workflow 3: Payment & Consent Chase
4. Build Workflow 4: Shipping/Pickup Notifications
5. Set up payment integration (GHL native or Stripe webhook)
6. Set up all custom fields and tags

Phase 2 — Operational Efficiency

7. Build Workflow 2: Rx Intake & Pharmacist Notification
8. Build Workflow 5: Refill Reminders (dynamic Days Supply)
9. Build B2B Provider Sales Pipeline
10. Build Workflow 1: B2B Lead Nurture
11. Build Workflow 7: Provider Portal Onboarding

Phase 3 — Transition & Advanced

12. Build Workflow 6: Legacy Fax Exception
13. Pioneer Rx ↔ GHL webhook integration (via Make/Zapier)
14. AI/OCR fax processing
15. Provider adherence reporting (automated)

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11. AI Prompts for GHL Workflow Builder (One Per Workflow)

Use these verbatim in GHL's workflow AI assistant or ChatGPT to generate node-by-node steps.

Prompt 1 — B2B Lead Nurture:

> *"Act as a GoHighLevel workflow expert. Build a HIPAA-compliant B2B lead nurture workflow for 'Soleil Pharmacy' (a compounding pharmacy). Trigger: contact is tagged 'B2B-Lead'. Actions: send welcome email 'Welcome to Soleil Prescriber Portal', send SMS confirmation, create an opportunity in the 'B2B Provider Sales Pipeline' at stage 'Lead', and assign a task to the SDR. After 2 days, if the tag 'Portal-Activated' is NOT present, send a demo booking email with a calendar link. After 3 more days, if still not activated, create a manual follow-up task. Exit when tag 'Portal-Activated' is added."*

Prompt 2 — Rx Intake & Pharmacist Alert:

> *"Act as a GoHighLevel workflow expert. Build a HIPAA-compliant Rx intake workflow for 'Soleil Pharmacy'. Trigger: inbound webhook from the prescriber portal containing patient info (no PHI in GHL messages). Actions: update the contact record with custom fields (Pioneer Rx #, Formula ID, Days Supply, Prescriber NPI), create an opportunity in the 'Patient Rx Fulfillment Pipeline' at stage 'Rx Received', then move it to 'Pharmacist Review', add tag 'Pharmacist-Review-Pending', and send an internal notification (SMS + email) to the pharmacist with generic info: 'New Rx ready for review — Pioneer Rx # [field]'. After 2 hours, if the pipeline stage is still 'Pharmacist Review', send an escalation alert to the pharmacist and the owner (Thuy)."*

Prompt 3 — Payment & Consent Chase (from v1, enhanced):

> *"Act as a GoHighLevel workflow expert. Build a HIPAA-compliant payment collection workflow for 'Soleil Pharmacy'. Trigger: pipeline stage changes to 'Pending Payment' in the 'Patient Rx Fulfillment Pipeline'. Step 1: add tag 'Payment-Pending'. Send a generic SMS: 'Your order from Soleil Pharmacy requires your attention. Please complete your secure form here: [link]' — do not include medication names or PHI. Also send an email version. Wait 24 hours. If tag 'Payment-Complete' is NOT present, send SMS reminder. Wait 24 hours. If still not paid, send email reminder #2. Wait 24 hours. If still not*

paid, create a manual task for staff: 'Call patient — 3 reminders sent, no response.' When tag 'Payment-Complete' IS added: add tag 'Consent-Signed', set custom field 'Consent Signed Date' to today, move pipeline to 'Compounding', and end the workflow."

Prompt 4 — Order Status Notifications:

"Act as a GoHighLevel workflow expert. Build two short status update workflows for 'Soleil Pharmacy'. Workflow A: trigger when pipeline stage moves to 'Shipped'. Actions: add tag 'Shipped', send SMS: 'Your Soleil Pharmacy order is on the way! Track it here: [Tracking Number] via [Shipment Carrier].' Also send email. Set a custom field 'Shipped Date' to today's date. Workflow B: trigger when pipeline stage moves to 'Ready for Pickup'. Actions: send SMS: 'Your Soleil Pharmacy order is ready for pickup.' Send email version. Note: never include medication names or diagnoses in any message."

Prompt 5 — Dynamic Refill Reminder:

"Act as a GoHighLevel workflow expert. Build a HIPAA-compliant refill reminder workflow for 'Soleil Pharmacy'. Trigger: tag 'Shipped' is added to a contact. The workflow must use the custom field 'Days Supply' to calculate when to send the reminder: wait (Days Supply minus 9) days after the 'Shipped Date' custom field. Before sending, check: (1) If tag 'Rx-Expired' is present, end the workflow. (2) If custom field 'Refill Count Remaining' equals 0, add tag 'New-Rx-Required' and send SMS: 'It may be time to connect with your provider for a new prescription for your Soleil Pharmacy order.' Otherwise, send SMS: 'Hi, your Soleil Pharmacy order may be running low. Reply YES to start your refill.' Wait 48 hours. If contact replies YES (or tag 'Refill-Requested' is added), move pipeline back to 'Pending Payment' and notify the provider via email. If no reply after 24 more hours, create a staff task."

Prompt 6 — Legacy Fax Exception:

"Act as a GoHighLevel workflow expert. Build a workflow for 'Soleil Pharmacy' to handle legacy fax prescriptions during the transition to a digital portal. Trigger: tag 'Legacy-Fax-User' is added to a provider contact. Actions: create a task for the SDR: 'Manual Rx received via fax from [Clinic Name]. Enter into Pioneer, then schedule portal training.' Add tag 'Portal-Training-Pending'. Send an email to the provider: 'We received your prescription. To save time on future orders, here's how to submit through our portal: [link to guide].' Wait 3 days. If tag 'Portal-Activated' is NOT present, create escalation task for Thuy: '[Clinic Name] has not activated portal — training call needed.' If tag 'Portal-Activated' IS added, remove tag 'Legacy-Fax-User' and end the workflow."

Prompt 7 — Provider Portal Onboarding (Post-Contract):

"Act as a GoHighLevel workflow expert. Build a provider onboarding workflow for 'Soleil Pharmacy'. Trigger: opportunity stage changes to 'Contract Signed' in the 'B2B Provider Sales Pipeline'. Actions: send a welcome email with portal login instructions and a PDF setup guide. Send a follow-up SMS: 'Your Soleil prescriber portal access is ready — check your email.' Wait 2 days. If tag 'Portal-Activated' is present: send a congratulations email, move pipeline to 'Portal Activated', and end. If not activated: send a follow-up email with a 1-on-1 onboarding call booking link (Calendly). Wait 3 more days. If still not activated: create a task for the SDR: 'Manual onboarding needed — [Clinic Name]. Call to walk through portal setup.'"